

MASSACHUSETTS

Public Employee Retirement Administration Commission

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MEMORANDUM

TO: Board Administrators

FROM: Joseph E. Connarton, Executive Director

DATE: November 2, 1999

We are gathering information to make a final assessment of the Year 2000 readiness of the Retirement Boards' computer systems, and their key business partners. Note, key business partners should include municipalities, Custodial Bank, Investment Managers, and Service Providers who process your payroll and disburse pension benefits to your retired members, be it the town or outside service provider. We ask that you mail or fax to us copies of Year 2000 Readiness Disclosure letters received from your key business partners, and Software Vendor(s) if not previously submitted.

In the PERAC Computer Survey that was done previously, you reported that your systems were Year 2000 compliant or that they would be Year 2000 compliant in the future through an upgrade or conversion. Our intent is not to request information previously received, but to follow up on your progress in updating or replacing systems that are not Year 2000 compliant, and to determine whether you have validated the Year 2000 Readiness of your key business partners, to ensure that they will continue to provide services into the next millennium, without any disruptions attributable to the Y2K bug.

The following instructions will hopefully eliminate any confusion regarding the information being requested in the Retirement Board Application Matrix. We respectfully ask that all Retirement Boards complete the survey and mail or fax it to Paul Laliberte at PERAC by November 15, 1999. If you need assistance in completing the Matrix, Paul can be reached directly at (617) 591-8980 or via Email at Paul.R.Laliberte@state.ma.us.

November 5, 1999

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Instructions for completing the Retirement Board Application Board Matrix:

Column 1. Is a list of possible applications or functions that may be computerized at your Retirement Board. Depending on your software vendor some of the applications or functions may be integrated or combined into one module. Please list any other application or function not identified above.

Column 2. Please specify in column 2, the Vendor Company Name, Contact Person, and Phone Number for each application or function. If all or some of the applications are provided by a single vendor, simply indicate “***SAME AS ITEM ABOVE***” in the appropriate row. If a function is not computerized enter “***N/C***”. If an application is using an In House developed system enter “***IN***” and provide the company and/or name of individual supporting the system. Lastly, if the function is being performed by a key business partner enter “***KBP***” and provide Company or Municipality Name, Department, Contact Person, and Phone Number.

Column 3. For each identified vendor and key business partner, please indicate whether you have received a Year 2000 Readiness Letter and attach a copy if not previously submitted.

Column 4. Please provide Version and Release level of each identified Software Application (ex. TACS Version 2.0) that is currently in use by the Retirement Board. If you are unsure, please check with your in-house or outside vendor.

Column 5. Please indicate whether each identified Software Application’s Y2K upgrade has been installed. If not yet installed, please provide Planned Installation Date. If no upgrade was required to make application Year 2000 compliant, enter “***N/R***” for not required.

Column 6. Please indicate whether Software Vendor Training was required and provided before implementing the Y2K upgrade version for each identified Software Application. If training is required but not yet attended, please provide Planned Training Date.

Column 7. For each Software Application’s Y2K upgrade that you listed in Column 5 as being installed, please indicate whether you have successfully migrated or converted to the upgraded software. If you are still running parallel with an older software version, please indicate so by entering “***R/P***” and provide Planned Migration or Conversion Date.

Thank you in advance for your prompt response.

Please complete the following Retirement Board Application Matrix:

(Note, if an item is not relevant reply with N/A, and if you are not sure reply with N/S)

1 Application or Function	2 In house or Outside Vendor or Key Business Partner Name <hr/> (Provide Contact Name & Phone #)	3 Vendor or Key Business Partner Y2K Readiness Letter Provided (Yes or No) (Please attach)	4 Software Version/Release For each Application In use today	5 Y2K Upgrade Installed (Yes or No) (Plan Date)	6 Y2K Upgrade Vendor Training provided (Yes or No) (Plan Date)	7 Y2K Upgrade Migration Completed (Yes or No) (Plan Date)
Active Member Management						
Retired Member Management						
Retiree Benefit Payroll						
Deduction Posting						
Disability and ReExam Tracking						
Retirement Accounting						
Securities / Investment Management						
Other Application or Function						
Other Application or Function						